

# DRAFT

DEPARTMENT OF WORKFORCE DEVELOPMENT  
DIVISION OF WORKFORCE SOLUTIONS  
ADMINISTRATOR'S MEMO SERIES

NOTICE XX-XX

ISSUE DATE: XX/XX/XXXX  
DISPOSAL DATE: XX/XX/XXXX

RE: **2003 REQUIRED TRAINING  
FOR WISCONSIN WORKS  
AND RELATED WORKERS**

To: County Departments of Human Services Directors  
County Departments of Social Services Directors  
Tribal Chairpersons/Human Services Facilitators  
Tribal Economic Support Directors  
W-2 Agency Directors

From: Mary C. Rowin  
Deputy Division Administrator

## **Purpose**

The Department of Workforce Development (DWD), Division of Workforce Solutions (DWS) will continue to require training for Wisconsin Works (W-2) and related workers in county and tribal agencies. The requirements are based on Administrative Rule DWD 17 (February 1, 2003), operational needs as well as W-2 Contract requirements as reflected in Contract section 6.1 (amended) and APPENDIX E, PERFORMANCE STANDARDS FOR THE 2002-2003 W-2 AND RELATED PROGRAMS CONTRACT (amended October 31, 2001).

## **Introduction**

This Administrator's Memo outlines both the initial and the ongoing training requirements for W-2 Financial Employment Planners (FEP) and Resource Specialists (RS). Definitions provided by DWD 17.02:

- ◆ A FEP is a case manager employed by a W-2 agency who determines eligibility, assists in the process of determining eligibility, or performs case management functions.
- ◆ Case management is the family centered and goal oriented process for assessing the needs of a W-2 group member and his or family for employment, training, and supportive services and assisting the W-2 group member in obtaining services to achieve self-sufficiency (DWD 17.02 [3]).

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- ◆ A RS is a worker employed by a W-2 agency who performs application entry, provides an initial assessment of a potential W-2 applicant's needs, makes referrals to service providers, or evaluates an individual's need for W-2. Resource specialist may also include a worker employed by an agency contracted with the department to provide access services.

The training requirements stated in this Administrator's memo reflect those for calendar year 2003 (January 1 through December 31, 2003).

It is important to make the distinction between new and experienced workers. The following definitions are taken from DWD 17.02 and should be used by W-2 agencies to make decisions regarding staff training requirements.

- *Experienced worker* means a W-2 Financial Employment Planner, or Resource Specialist employed by a W-2 agency before the effective date of this subsection (February 1, 2003), or a worker who has completed appropriate W-2 New Worker (initial) or related training.
- *New worker* means a person who is employed by a county or tribal W-2 agency as a W-2 Financial Employment Planner or Resource Specialist on or after the effective date of this subsection (February 1, 2003), including a permanent employee who transfers into a W-2, or related worker (FEP, RS) position and who has not completed initial program training.

### **RESPONSIBILITIES OF THE STATE**

#### **DWS/BPS Training Section**

The Division's Partner Training Section is responsible for coordinating all training related to W-2 and associated programs. The goal of training is to support local agencies as they administer these programs. This support will include the development, delivery and maintenance of quality training services. Training events will be planned, managed, provided and coordinated by the DWS Partner Training Section.

### **RESPONSIBILITIES OF W-2 AGENCIES**

#### **Wisconsin Works (W-2) Agency Training Liaisons (ATL)**

Each W-2 agency must designate an Agency Training Liaison (ATL), as a point of contact for training issues. The Area Administrator (AA) is to be provided with the name of the ATL and changes in personnel need to be reported to the AA. The ATL does not need to be a full-time trainer position. The ATL is to work with the Training Section on training activities and issues.

Local agencies will be responsible for the general development of their employees and for training not offered by the Department. It is the W-2 agency's responsibility to ensure that their staff has the skills needed to perform job functions. W-2 agencies are responsible for:

- ensuring that all W-2 and related staff complete the prescribed Department training;
- ensuring that new and experienced W-2 and related workers are trained in a timely manner on all W-2 and related programs policy, procedure and automated system updates that are issued by the Department;
- ensuring that subcontracted staff complete required training;
- ensuring that the agency supplements Department training to specifically meet the needs of the agency and their workers, including training on local processes;

- maintaining automated records of staff training such as types of training attended and the dates attended (the DWS/BPS Training Section will maintain files of DWS sponsored training);
- establishing an ongoing method of assessing its training needs and completing a training needs assessment; and,
- ensuring staff are literate in personal computers and word-processing software. The Department recommends working with local technical colleges and private providers as appropriate to meet these training needs.

***NEW W-2 Financial and Employment Planners (FEPs) and Resource Specialists (RSs)***

All FEPs and RSs employed by a W-2 agency must complete the New Worker Training program. The W-2 agency shall ensure that each new FEP or RS completes the Department's initial training during the first 6 months of employment (DWD 17.03[2]). It is the Department's intent to supply sufficient opportunities for this learning to occur.

Completion of the New Worker program requires involvement and participation in all appropriate instructional activities. The topics contain the knowledge and skill areas needed to assist workers in successfully understanding the administration of W-2, and other related programs. The topics have been identified and incorporated to help the administrative agencies meet performance and quality assurance standards.

The W-2 agency shall develop evaluation strategies to ensure that the new W-2 worker achieves a minimum standard of competence (DWD 17.03[2]).

*If a worker completes the New Worker training program during the first half of the calendar year, six hours of professional development activity and six hours of Enhanced Case Management are required.*

*If a worker completes the New Worker training program during the second half of the calendar year, there are no professional development or Enhanced Case management requirements for that calendar year.*

A W-2 agency that chooses not to participate in the Department sponsored New Worker Training Program shall develop a plan to implement the standardized new worker curriculum developed by the Department.

An agency can submit a request to implement the full curriculum or any part of the curriculum. If an agency plans to provide a portion of the full curriculum, their new workers will participate in additional training activities scheduled by the Department to complete the new worker training requirements for their job function.

The implementation plan shall be submitted to the DWS Partner Training Section for approval at prior to the planned starting date of training, when it is first offered, and annually after that.

One of the key criteria for approving an agency's request to administer the standardized curriculum is the availability of an employee dedicated to staff training responsibilities. Specifics of the plan are described in DWD 17.04(3). Contact Lynda Fischer (New Worker

Training Operations Lead) [Lynda.fischer@dwd.state.wi.us](mailto:Lynda.fischer@dwd.state.wi.us) with questions regarding what to include in the required implementation plan

DWD 17.03 requires that within the first year of employment, a FEP shall complete 12 hours of training in domestic abuse awareness, including case management strategies and the department's comprehensive screening tool. Within the first year of employment, a Resource Specialist (RS) shall complete 6 hours of training on domestic abuse.

***EXPERIENCED W-2 FEPs AND RSs,***

**Following are the CY2003 training requirements for experienced W-2 workers:**

**Professional Development Requirement**

A minimum of twelve hours of professional development is an annual requirement of all experienced W-2 workers and supervisors within W-2, and related programs.

Professional development includes, but is not limited to DWS Enhanced Case Management programs, conferences, technical college courses, seminars, workshops, and/or policy and procedure refresher training. This professional development training does not need to be conducted or sponsored by Department staff. The county or tribal W-2 agency will select the appropriate professional development training for each of their workers and maintain records to document that this requirement has been met. Agencies will have full discretion as to what training fulfills this requirement for each employee, but training records, as described, must be maintained to document completion.

**Enhanced Case Management Training**

Enhanced Case Management programs develop the ability of supervisors and workers to provide quality services to all of their customers, including customers with special needs. Twelve hours of Enhanced Case Management activities are required for all experienced W-2 workers for calendar year 2002. Enhanced Case Management topics are interpersonal skills, special needs, programmatic, and supervisory skills training programs.

These topics will be offered as classroom programs, or through alternate methods. Classroom programs will be offered on a regional basis. The topics are divided into four subcategories:

- Programmatic - These courses focus on developing knowledge and skills which will enhance interaction with customers, improve caseload management and promote strategies for meeting program requirements.
- Special needs - These courses assist staff in understanding behavioral, physical and situational challenges which may require accommodation, outside intervention or special strategies in working with a customer.
- Interpersonal skills - These courses assist staff in developing skills and strategies for effective communication, teamwork, customer service and personal growth and development.
- Supervisory - These courses are designed for current supervisors and those preparing for supervisory roles. They will help supervisors and lead workers to work effectively with staff

to meet program and agency goals through practical applications and sharing of best practices.

Enhanced Case Management Topics are identified as such in the course descriptions.

### **Domestic Abuse Training (DWD 17.04 [2])**

An experienced FEP who has not completed the department's 12 hour training in domestic abuse awareness including case management strategies (*Domestic Abuse*) and the department's comprehensive screening tool by February 1, 2003, shall complete this training before February 1, 2004.

### **ALL W-2 AND RELATED WORKERS**

#### **New Policy and Refresher Training**

As new policy is developed and implemented, affected workers must attend the appropriate training sessions. Refresher training will be identified as required training based upon Department decisions and standards. Course descriptions will identify the required programs.

#### **Waivers and Training Equivalencies**

The DWS Training Section will accept reasonable, justified proposals to waive individual training program requirements, or approve training equivalencies.

If a W-2 agency desires a waiver, they must submit a waiver request outlining the reasons for the request to the appropriate Area Administrator. The proposal must include documentation, such as training course outlines, course materials, curriculum guides, and/or documentation of equivalent experience. If the waiver is related to substituting another training program or experience for a DWS requirement, the proposal must detail how that curriculum/experience accomplished the objectives of the DWS program. The waiver request is available on line at [http://www.dwd.state.wi.us/destrain/supcentral/home\\_first-time.htm](http://www.dwd.state.wi.us/destrain/supcentral/home_first-time.htm)

Waiver/equivalency requests will be reviewed on a case by case basis. The DWS Partner Training Section will communicate a decision no later than 30 days from the date of receipt of the request.

#### **Training Records**

Each W-2 agency is required to keep records of all training attended by each worker. The records must be maintained in an automated system that can sort by both training participant and training program information. **At a minimum, the categories of information collected should include the employee name, position title, date of assumption of the position, training program, date of program, number of hours attended, and sponsoring organization of the training. Approved waivers/equivalencies for ECM requirements should be indicated.**

**A sample training report:**

<u>Employee name</u>	<u>Position Title</u>	<u>Position Hire date</u>	<u>Training Program</u>	<u>Date of Training Program</u>	<u>Numbers of hours attended</u>	<u>Sponsoring Organization</u>	<u>Approved ECM waiver/ equiv.</u>
Sue Smith	FEP	01/03/02	Domestic Abuse	02/03/02-02/04/02	12	DWS/ BPS	NA
Sue Smith	FEP	01/03/02	Mental Health Diagnostics and their Effects on Employment	09/14/02	6	WETA Mini-Conference	Yes

Training reports will be submitted, sorted by training participant, on a yearly basis to the appropriate Area Administrator by the second Friday in January.

The DWS Partner Training Section will also maintain training records for workers who attend DWS sponsored programs.

***SUMMARY OF TRAINING REQUIREMENTS***

The following is an outline of requirements for both new and experienced W-2 workers:

**New Workers**

1. New Worker Training Program
2. Professional development (6 hours maximum)
3. Enhanced Case Management (6 hours maximum)
4. Domestic abuse (12 hours for FEPs, 6 hours for RSs)

**Experienced Workers**

1. New Policy and refresher training specific to job functions and duties
2. Enhanced Case Management (12 hours)
3. Professional development (12 hours)
4. DWS' course *Domestic Abuse* (12 hours by February 1, 2004)

**REGIONAL OFFICE CONTACT:** Area Administrator

**CENTRAL OFFICE CONTACT:** Gerry Mayhew  
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